

RPTR WARREN

EDTR ZAMORA

CONSTITUENT SERVICES: BUILDING A MORE

CUSTOMER-FRIENDLY CONGRESS

Thursday, July 14, 2022

House of Representatives,

Select Committee on the Modernization of Congress,

Washington, D.C.

The committee met, pursuant to call, at 10:02 a.m., in Room 2118, Rayburn House Office Building, Hon. Derek Kilmer [chairman of the committee] presiding.

Present: Representatives Kilmer, Cleaver, Phillips, Williams, Timmons, Davis, and Latta.

The Chairman. The committee will come to order.

Without objection, the chair is authorized to declare a recess of the committee at any time. And I now recognize myself for 5 minutes for an opening statement.

So whenever the topic of how Congress can do a better job comes up, I often think about my weekly or mostly weekly experience at the airport where I unfortunately spend a lot of my time.

After I go through security, I immediately get a text from CLEAR, which is our expedited airport security service, asking me how they did. And I can give positive or negative feedback instantaneously, and they can use that information to figure out pain points and improve services.

So Congress doesn't have anything like that, but perhaps it should. Any Member will, of course, tell you that we get plenty of constituent feedback in the form of phone calls and emails and social media posts. Our job as Representatives is to give voice to our constituents, and we need to hear from them in order to effectively represent their views in the policymaking process.

This form of feedback is an important and necessary feature of representative democracy, but I am talking about a different kind of feedback. In addition to representing the views of our constituents, our offices also help them navigate the Federal bureaucracy. We facilitate constituent requests to the executive branch agencies, we assist in scheduling tours of various government buildings, and we help them secure official documents and flags flown over the Capitol Building. These are really important services, and we have no idea if we are doing a good job providing them.

So often this work involves sending constituent requests on to another entity. And then, depending on that entity, to follow through, tracking requests can be incredibly

difficult, if not impossible, in some cases. And privacy protection rules can make it tough for us to follow up with Federal agencies in getting additional information that might assist our constituents in getting a simple status update. This is an area where I think feedback, as well as systems for tracking requests and detecting common patterns, would be immensely helpful.

For example, we might learn from constituent feedback that a particular agency's response time is unusually slow. Tracking systems might show us where requests are getting held up, and those systems might also help us detect patterns in the number of requests we are getting related to a particular government program.

This kind of data can inform Congress' oversight activities and help us get ahead of problems before they do real damage. These kinds of customer feedback loops are pretty standard in pretty much every business, and there is a reason for that. They help companies improve their customer service, which then improves customer trust in the business.

We know that Congress isn't a business, but it does work for the American people. And when it comes to the services our offices provide, constituent feedback can help us do a better job. The American people expect competent customer service, and I think we owe it to our constituents to meet, if not exceed, that standard.

So the good news is that technology solutions exist, and today we are going to hear from some experts who have thought a lot about how Congress can take advantage of feedback and tracking systems that are standard across the private sector.

The committee will use its rules that allow for a more flexible hearing format that encourages discussion in the civil exchange of ideas and opinions.

Here comes the good, wonky part.

In accordance with clause 2(j) of House rule XI, we will allow up to 30 minutes of

extended questioning per witness. And, without objection, time will not be strictly segregated between the witnesses, which will allow for extended back-and-forth exchanges between members and the witnesses.

Vice Chair Timmons and I will manage the time to ensure that every member has equal opportunity to participate. Additionally, members who wish to claim their individual 5 minutes to question each witness pursuant to clause 2(j)(2) of rule IX will be permitted to do so following the period of extended questioning.

I feel like I really nailed that.

So, with that, I would like now -- I would like to now invite Vice Chair Timmons to share some opening remarks.

[The statement of Chairman Kilmer follows:]

\*\*\*\*\* COMMITTEE INSERT \*\*\*\*\*

Mr. Timmons. Thank you, Mr. Chairman.

I want to begin by thanking our witnesses for joining us today. Your combined years of public service and your ongoing work to improve the effectiveness and responsiveness of government will surely provide unique and helpful perspectives from which we can draw in evaluating Congress' own performance in identifying the areas of improvement.

I am very excited for today's hearing on improving constituent services and opportunities to make Congress a more customer-friendly and helpful institution.

It is often said that this is a people business. More accurately, it is a service business.

I cannot tell you how rewarding it is to deliver top-rate constituent services to people in my district. It is one of the best parts of this job, helping people get something from the Federal Government that they are owed, whether it was during the pandemic with PPP loans and then COVID relief or veteran's benefits, Medicare, you name it. We deliver the best customer service possible, and we love doing it.

And if each office can improve just a little bit because of this hearing, it will have a huge impact on the American people. And, more importantly, as the chairman referenced, if we can get better feedback on what are the difficult parts of the Federal Government that are coming up short across the country, we can improve processes. And we can use those processes to make the whole system better.

So we are going to really make some progress in this hearing, and I cannot wait to hear your recommendations.

Again, I am sorry I am not there. I wish I was. Looking forward to being back with you all next week.

But, Mr. Chairman, look forward to this hearing. Thank you so much. Thank you to the witnesses.

And I will yield back.

[The statement of Mr. Timmons follows:]

\*\*\*\*\* COMMITTEE INSERT \*\*\*\*\*

The Chairman. Terrific.

I would now like to welcome our three witnesses who are here to share with us their experiences in working to make Congress a more responsive institution.

Witnesses are reminded that your written statements will be made part of the record.

Our first witness is Anne Meeker. Ms. Meeker is director of Strategic Initiatives at POPVOX Foundation, a nonpartisan platform for civic engagement tools. Prior to this, she was the technology, science, and data project manager for POPVOX. Ms. Meeker previously served as the director of Constituent Services for Congressman Seth Moulton and managed the Technology, Science, and Data Orientation Session at the U.S. House of Representatives New Member Orientation for the class of 2020.

Ms. Meeker, you are now recognized for 5 minutes.

**STATEMENTS OF MS. ANNE MEEKER, DIRECTOR OF STRATEGIC INITIATIVES, POPVOX FOUNDATION, CLEVELAND, OH; MS. NINA OLSON, EXECUTIVE DIRECTOR, CENTER FOR TAXPAYER RIGHTS, WASHINGTON, D.C.; AND MR. MATT LIRA, PARTNER, HANGAR CAPITAL, WASHINGTON, D.C.**

**STATEMENT OF ANNE MEEKER**

Ms. Meeker. Chair Kilmer, Vice Chair Timmons, members of the select committee, and staff, thank you for holding today's hearing on constituent services and for your continued hard work to make Congress more resilient.

I had the privilege of serving as Director of Constituent Services for the Office of Congressman Seth Moulton until December of 2019. Working with constituents of the Massachusetts 6th as part of that team was one of the greatest honors of my life.

I would also like to say I have been a long-time Taxpayer Advocate Service fangirl, and I have spent the last few years professionally bothering Matt Lira in my current role as director of Strategic Initiatives for the POPVOX Foundation. So it is an enormous honor to appear with them today.

One of the things that has stayed with me from my work as a caseworker is how many constituents facing incredible challenges had the grace to ask how their experience could be used to prevent similar problems from happening for others. For me, answering that question is at the heart of building a more constituent-friendly Congress. And in that spirit, it is my privilege to offer four recommendations today.

First, the Chief Administrative Officer should establish House-wide unified analytics to identify and monitor casework trends. Every day, congressional offices



receive rich input directly from constituents attempting to access vital services and information from Federal agencies. These cases often illustrate bottlenecks or a lack of clarity in language or procedures and can be a valuable source of insight for committee oversight or legislative action. However, Congress does not take advantage of this information because this data is siloed across 541 individual offices.

To make that data useable, this committee should consider recommending that the House Chief Administrative Officer work with caseworkers to develop a case-tagging system that better captures the details of individual cases, require technology vendors to incorporate the new tagging system into approved casework software, and develop an opt-in advanced programming interface, or API, allowing offices to share anonymized case data to a central repository.

Aggregated casework data could allow support agencies, committees of jurisdiction, and individual offices to track casework trends and identify emerging problem areas. These statistics can also help lawmakers identify regional or State-specific problems and help new offices understand their districts' needs.

For constituents, this would mean a more effective casework system overall and the reassurance that Congress is learning from their individual experiences.

Second, expanded contact information for relevant agency staff. So in our office, we spent an enormous amount of time tracking agency contacts beyond CRS' basic liaison list and had horror stories of casework inquiries lost and abandoned in boxes. Finding correct agency contact information is also one of the most significant challenges for new offices.

To address this challenge, this committee could recommend that CRS maintain an updated contact list of agency liaisons, including field office staff, processing center staff, ombuds or advocate staff, and other contacts, as appropriate, for each agency.

Third, expand opportunities for caseworkers to share best practices, including through in-person professional development. One case that has always stayed with me was a retired middle school math teacher who came to our team when her Social Security retirement benefits were suddenly and dramatically reduced due to the Windfall Elimination Provision. When we could not help her reach a favorable resolution, we worked with our local Code for America Brigade to create a benefit calculator that we hoped would help other constituents affected by this provision avoid the same surprise.

Casework teams around the country develop their own innovations to help constituents, but these innovations often remain limited to one district because there is no way for offices to share their work.

I would encourage this committee to recommend that CAO expand the online training and information hub associated with its new coaching program to allow casework teams to share their own case studies and resources, giving all offices access to the institutional knowledge required for good casework.

I also want to emphasize the importance of in-person training and networking opportunities. Providing a way for caseworkers to form relationships and learn from colleagues benefits all offices, especially because casework topics often transcend partisan divides and open pathways for bipartisan collaboration.

Lastly, expand support services for district and casework staff. While seeing the courage and the selflessness and the resilience of ordinary Americans through casework is uniquely rewarding, casework is also uniquely taxing. Caseloads remain far above pre-pandemic averages, and constituent interactions are increasingly mistrustful and combative. Recent issues like the pandemic and the Afghanistan withdrawal have also challenged casework teams' capacities like never before.

Caseworker burnout impacts Congress' ability to serve constituents, and I

encourage this committee to recommend the House Office of Employee Assistance consider a series of site visits to district offices to understand the current working environment for casework and assess whether additional support recourses are warranted.

My written testimony contains further details on each of these recommendations.

Thank you again for your attention to this important topic, and I look forward to your questions.

[The statement of Ms. Meeker follows:]

\*\*\*\*\* COMMITTEE INSERT \*\*\*\*\*

The Chairman. Thank you, Ms. Meeker.

And our next witness is Nina Olson. Ms. Olson is the executive director and founder of the Center for Taxpayer Rights. From 2001 to 2019, she served as the National Taxpayer Advocate of the United States, whose office assists taxpayers in resolving their problems with the IRS and in making administrative and legislative recommendations to mitigate systemic problems.

Ms. Olson, you are now recognized for 5 minutes.

## STATEMENT OF NINA OLSON

Ms. Olson. Thank you, Chairman Kilmer, Vice Chairman Timmons, and members of the select committee. Thank you for inviting me today to speak about the Congressional Affairs Program of the Taxpayer Advocate Service, or TAS, and the constituent services it provides to local and Washington, D.C., congressional offices.

The first prong of TAS' statutory mission is to help taxpayers solve their problems with the IRS. This is the focus of TAS' case advocacy function. To deliver that mission, Congress required the National Taxpayer Advocate, or NTA, to establish at least one local office in every State. Today, TAS has 75 local offices, including the District of Columbia and Puerto Rico. Each office is headed by a local taxpayer advocate, or LTA, and staffed with case advocates who work on taxpayer cases.

Case advocates maintain an inventory. That is, they own their caseload. Every case advocate has their own toll-free line extension so taxpayers have a freeway to get directly in touch with their case advocate.

To get a case accepted into TAS, taxpayers have to experience significant hardship, which is defined as a significant privation, or imminent threat of harm or adverse impact, or a delay over and above normal processing times. TAS assistance is available to all taxpayers, individuals, small and medium business, large entities, nonprofit entities, even municipalities, States, and Tribal governments.

Between 2001 and 2019, TAS received over 4 million cases. For each of those cases, TAS assigned at least one issue code, describing what was involved in the case. For example, an earned income credit audit or a request for a Federal tax lien released or a frozen tax refund flagged for identity theft. With over 100 issue codes available, TAS

cases paint a clear picture of where taxpayers are struggling and where IRS procedures seem to be confusing or deficient.

The Congressional Affairs Program grows out of TAS' geographic approach to its casework. TAS' local offices are responsible for working all case-related issues that congressional offices send to the IRS. Every congressional district and State are assigned to one local taxpayer advocate office. In this way, relationships and trust between the LTA, case advocates, and local congressional staff build up over time.

The importance of congressional cases is reaffirmed by the requirement that all correspondence with the congressional office must be signed by the LTA. It cannot be delegated. LTAs are required to visit each congressional local office at least once each year. When local congressional offices hire new staff, the LTAs are required to reach out to the staff and explain how best to interact with TAS.

The hundreds of thousands of cases TAS receives each year are a gold mine of data with which to identify systemic problems, problems that are affecting not just the specific taxpayer involved in the case but a group of taxpayers or all taxpayers. TAS staff analyze TAS case data to identify trends in IRS program areas and identify whether problems are occurring at a local, regional, or national level.

TAS constituent case data also helps TAS advocate internally for improvement to IRS procedures and employee guidance. In this way, through TAS predecisional advocacy, it can prevent problems from occurring or recurring, thereby minimizing burden and harm to constituents.

By requiring the NTA to issue two reports to Congress annually, Congress gave the NTA a very important vehicle with which to independently raise her uncensored concerns about taxpayer problems and directly make administrative and legislative recommendations to Congress. The reports are grounded in both the case and systemic

advocacy work that TAS does every day.

The annual Congressional Affairs Program conference held in February each year completes the cycle of TAS' systemic advocacy and constituent service. Prior to the conference, LTAs contact the Members of Congress aligned with their offices and schedule meetings with Members or staff. During these visits, LTAs are able to share their firsthand experiences, the results of their casework originating from that office, and thereby bringing TAS' recommendations close to home.

After their congressional visits, they share their comments, they shared their -- they would share their comments with me and expressions of interest from the Members, and I could follow up with the Members or staff. These visits often resulted in legislation being introduced.

So I just thank you today for the opportunity to share with you my perspective on constituent service provided by the Office of the Taxpayer Advocate, and I look forward to working with your committee on this matter so critical to improving the operation of government and establishing trust.

Thank you.

[The statement of Ms. Olson follows:]

\*\*\*\*\* COMMITTEE INSERT \*\*\*\*\*

The Chairman. Thank you, Ms. Olson.

And last but not least, we are joined by Matt Lira, who is a partner at Hangar Capital. Prior to that, he most recently served as Special Assistant to the President for Innovation and Policy Initiatives during the Trump administration. Mr. Lira has had a unique career working in the political, government, and private sectors to improve digital platforms to make a smarter, more efficient and more effective government. He has also served as senior advisor to House Minority Leader Kevin McCarthy and as a deputy executive director of the National Republican Senatorial Committee.

Mr. Lira, you are now recognized for 5 minutes.



## STATEMENT OF MATT LIRA

Mr. Lira. Thank you.

Chairman Kilmer, Vice Chair Timmons, and members of the committee, thank you for holding today's hearing and for inviting me to discuss this important topic.

We all know the feeling, what it is like to be delighted by customer interaction. Review any list of the most popular, most trusted, and often the most successful brands in the United States and you will see a list of organizations that treat their stakeholders well.

Throughout every touch point, in ways both large and small, the user experience is prioritized. It is more than a mere luxury. It is a feeling of respect, it is a feeling of being valued, and it creates trust.

At the core, this is what constituent service is all about. Delivering a modern approach for constituent services has the potential to reinvigorate the legislative process, streamline casework requests, and rebuild the public's trust in their national civic institutions.

In my discussions with Members and staff, there has rarely been resistance to the idea of modernization in principle. In fact, it is an idea that is typically met with enthusiastic support. However, in practice, implementation efforts are often inhibited by capacity limitations within their offices.

To confront this reality, the House should prioritize improvements that unlock the ability to improve not just a single constituent service but the overall capacity to improve all constituent services. These can be outlined across three broad categories: ensuring executive sponsorship, enhancing House-wide capabilities, and expanding the capacity of

individual Member offices.

Towards that end, I recommend the following initial steps be taken. One, the House should designate and empower a senior official with responsibility for coordinating improvements to House-wide capabilities in constituent experience. In support, each House officer should designate a point person for improving constituent services impacted by their agency.

For most Americans, the only direct interaction they will have with their elected representatives is via constituent services. Yet institutional responsibility for the baseline quality of those experiences is somewhat amorphous. While there are several dedicated public servants who care about this issue working in the House and doing phenomenal work, these concerns are typically only one aspect of a broader portfolio, rather than their primary focus and responsibility.

Two, the House should publish a core set of secure standards-compliant application programming interfaces, or APIs, for the most common constituent services provided by House offices. Similar in this respect to the Communicating with Congress service, these constituent service APIs would enable approved developers and vendors to use their expertise to improve the constituent experiences provided by the House.

Three, the House should leverage existing commercial technologies that will remove the extensive inefficiencies that have long faced the daily operations of individual Member offices, particularly those which are currently handled by entry-level and junior staff. Time, energy, and resources spent performing repetitive, manual processes can be shifted to higher-value work. There is perhaps no greater opportunity for rapidly expanding the ability of every Member office to improve their engagement with their constituents.

Ultimately, however, the House should do more than streamline existing

processes. It should incorporate modern technology into the overall congressional workflow. In this single week, Congress is expected to consider 26 separate pieces of legislation, conduct 14 hearings, and host countless engagements on a full range of topics. Each event is important to certain constituencies. Yet most of those same constituencies will never know they occurred. In this regard, Congress is often like a student who completes their homework, yet neglects to actually turn it in. This is more than the communication challenge it is often confused to be. It reflects a fundamental disconnect between congressional capabilities and the public's expectations.

Over a half century ago, faced with the rapid emergence of television, the House embraced new technology and fully incorporated television into its routines. Congress did more than simply add an easel to the corner of a room or allow individual Member offices to experiment with the camera. The House floor and committee hearing rooms, including the one we are sitting in today, received stage lighting, control booths, becoming elaborate television studios in effect. These capabilities were more than vanity. They enabled the Congress to succeed in an era dominated by television.

Today, it is once again critical that Congress as an institution modernize its capabilities to meet the public's expectations in a digital world. Every day, somewhat quietly in the background, thousands of constituent actions -- or interactions are happening throughout congressional offices. How many of those interactions have delighted people? How many of those have made people feel heard by their government? How many have created trust?

I commend the committee for hosting this important discussion. I have more extensive recommendations in my written statement, and I look forward to our discussion.

[The statement of Mr. Lira follows:]

\*\*\*\*\* COMMITTEE INSERT \*\*\*\*\*

The Chairman. Thanks very much.

I now recognize myself and Vice Chair Timmons to begin a period of extended questioning of the witnesses, and any member who wishes to speak should just signal their request to either me or Vice Chair Timmons.

So, Mr. Lira, I kind of want to start where you ended. You know, it seems like there is the capacity for technology to improve the engagement of Members of Congress with their constituents. So I think in your written testimony you mentioned the analogy of Congress being like a student who completes their homework and then forgets to turn it in. You know, that is, to me, a great description of the disconnect that exists between congressional offices and constituents. Congress actually does some of this important work that our constituents care about, but we hear from our constituents that they don't know about it.

You know, so just as an example, a constituent may write in about a topic about which they care passionately, and they may get a response letter at that time. But then, if something actually happens to that bill, it passes the House or, you know, maybe we have a system where eventually we figure out a 499 or something like that in response, but it seems like technology exists that would enable something to happen more directly and immediately to address a constituent's concern.

How hard would that be?

Mr. Lira. Well, thank you, Chair. That is a fantastic question.

I think -- so you nailed, I think, the essential point, which is that people are expressing proactively their interest in a given issue, oftentimes in a specific piece of legislation, you know. And yet, you know, they get their response, the generic form letter. Maybe in some offices it is fast and some offices it is a little slower, but it

ultimately doesn't keep up with the work that Congress is actually doing.

So from a technological perspective, it is actually quite easy to build platforms which would enable even automated responses and updates to say, well, if someone has written in about -- I will make it easy -- like H.R. 1, that they receive updates on their preferred method of communication -- which may not be a letter; it could be a text message or a social update -- that, oh, H.R. 1 has moved through committee. H.R. 1 has passed the House. H.R. 1 has become law.

And the reas -- if you were to task an individual office with doing that with today's capabilities, it would be daunting --

The Chairman. Yeah.

Mr. Lira. -- because it would be a manual process and people are underwater, just keeping their head afloat with all the inbound communication.

But this is again where the technology plays a critical role. By automating not only that capability but other capabilities that they are currently spending manual work hours on, it enables that kind of communication to happen programmatically.

I think historically there have been Member offices that have experimented with these kinds of approaches on an individual level, some of which with a certain measure of success. But the challenge is -- and, again, I draw the analogy back to television, you know, 50 to 70 years ago. The expectation that an individual Member office with their level of resource should build this infrastructure I think is unrealistic. This needs to be something that is provided by the entirety of the House to all offices so that they can all be positioned to provide these sorts of updates.

One other extension on that, if you will indulge me, is, in addition to -- I think providing updates as to what Congress is doing is the baseline and that once you are able to do that programmatically, you actually unlock the ability to do true authentic

engagement on top of that.

So if someone writes in a letter about H.R. 1, and it is in the committee, that you would have the opportunity as a Member to have, you know, a live-streamed Q&A session or a teletownhall about that specific bill with people who have expressed interest, with constituents who have expressed specific interest about that legislation. And, again, I view this as an area of tremendous opportunity for the House.

The Chairman. Yeah, I do too.

Let me stick on this theme of how we might use technology better. And, Ms. Meeker, I wanted to get a sense from you, and you touched on this in your testimony.

Right now, the technology tools that are used by congressional offices are mostly focused on incoming and outgoing correspondence but are also used for casework. Are there tools available that are better suited to intaking and tracking and processing casework?

And beyond that, I could not agree with you more about the importance of, as we get casework, as we do casework, aggregating some of that information and identifying problems that are consistent across Member offices. Is there a way to do that now? Is there any way with the tools that are in place now to use anonymized data for constituent management system and address some of these concerns?

Those are my two questions.

Ms. Meeker. Sure. So to take those questions in order, so as you mentioned, the current constituent relationship management platforms are not necessarily custom built for casework. I will say I am aware that there are other software platforms that are built more for analogous interactions. Like, I know that there are tech -- there is technology available for like social work interactions and medical interactions that may be closer analogies to casework. I haven't personally used them, so I can't speak to how effective they are or how much they would translate into a congressional office.

To your question on whether it is possible to gather and use casework data right now, I think individual offices are doing that. So in our office, we did develop a more extensive system of case tagging that was incredibly helpful for our team for assigning



case portfolios, for tracking trends at the district level.

But as far as using it on a national scale, to my knowledge, there is no way to do that right now. And there are kind of two things that are in the way there. The first is that, as I said, each office tags differently. And most offices develop tags that go above and beyond the ones that come standard with CRMs. But that means that each office develops a different set of tags that aren't analogous and can't be transferred between offices right now. And then, as you say, there is no way to bring all of those together.

The Chairman. Yeah.

Ms. Meeker. There is no way to just bring them all into one aggregate data set.

The Chairman. Yeah.

Let me invite Vice Chair Timmons to weigh in with questions.

Mr. Timmons. Thanks, Chairman.

I want to build on what we just finished on. Matt, you were talking about APIs. That is essentially what we are talking about here, trying to get the data aggregated and then anonymized so we can learn from it. Is that what you were referencing in your opening?

Mr. Lira. Yes, sir, to a certain degree. Inclusive of that, I would go beyond that one specific task, but I think that is one element of it. You know, I think when you think of the privacy act implications or the, you know, the constituent relationship realities of Members wanting to retain ownership over that, the way that I like to think about it is, rather than bring data to questions, I bring questions to data.

And so the data can remain within the repository of the Member office and under the Member's control and, therefore, respect the confidences of their constituents, but you are still able to do the broadscale analysis that Anne referenced through APIs.

I would go further with APIs to say I think that APIs can be used for all constituent

services, not only casework data. But, yes, there is the potential there.

Mr. Timmons. Do you know of any State, local, or foreign government that is doing this effectively?

Mr. Lira. I don't know of any State and local, though I am sure they are out there by sheer numbers. Internationally, I mean, everyone speaks of Estonia, but I think of the United Kingdom. They have been able to leverage APIs to connect their legacy back-end infrastructure, which is often out of date, to enable modern, front-end user experiences.

I was in discussion with the United Kingdom in my previous role, and they have fairly good front-end user experiences for the Parliament. And I was asking, well, how do you do this, and how did you shift to new servers, and how did you to the cloud and sort of all these mammoth, you know, technology migration tasks.

And they were, oh, yeah, we still have to do that. We haven't done that yet, but we have been able to use APIs to make sure that our constituents are having a modern experience.

So they are prioritizing the end user experience even as they pursue back-end technology.

Mr. Timmons. Sure. One more question. Speaking of improving services overall, as you recall, Congress passed the Creating Advanced Streamlined Electronic Services for Constituents Act, which is a great name, the CASES Act. And, I guess, my question is -- theoretically, we should be fully transitioned to digital signatures and it should be somewhat mandated, I guess. It doesn't seem like that is the case.

Could you talk about -- Matt, could you talk about implementation of the CASES Act, how it would improve services, and whether it has been implemented universally or whether we still need to work on that?

Mr. Lira. Yes, sir. That is a fantastic question. First of all, I will say, as a

former staffer, I always appreciate a great acronym for any piece of legislation. So CASES is on that list.

The implement -- so CASES, I think, is critically important. You have the -- I believe it was inspired by disaster response where people whose homes had been destroyed were waiting to get a wet signature before they could get disaster process underway. So it is fantastic legislation.

You know, Congress did its job. OMB has issued its guidance to do implementation, but the agency implementation is varied, that while some agencies have moved forward on cases, not all agencies, including some A-level, high-impact service providers. So the 26 or so agencies that provide the highest -- the most touch points services out there have yet to do it.

And for me it is a question of prioritization. The legislation, you know, passed in 2019. We then went into the crisis era. And as we come out of that era, I think it is important for Congress to reiterate that that is a priority for agencies to do their migration and ensure that it happens.

It would be enormous benefit for constituents. And, again, if you go for -- it may not be the top problem facing an agency's internal operation. It may not be the top problem facing the average congressional office, but it is one of the top problems facing constituents. And so if you face -- if you use a user-first mindset, it should be one of the top priorities to update.

Mr. Timmons. So would you say that this is bureaucratic resistance? Do we need to change laws? What can we do to push this forward?

Mr. Lira. So given the CASES Act itself provides the statutory authority and, I believe, the mandate to do it, I don't believe it is a question of statutory authorization. My experience with agencies would indicate that there is -- there are excuses and there

are reasons. And so if they are giving you the need for a statutory change to implement this, particularly when other agencies have already done it, I would file that under the category of an excuse and something that Congress should provide oversight energy against.

If there is an authentic reason -- and I suspect the reasons will look like, you know, budget levels and just general priorities for their authorization -- then, again, that lends itself to oversight to say, well, we appreciate that the agency has different priorities, but the Congress has established this as the priority and it should, therefore, move its way up the agency's priority list.

So I really, to be succinct, think it is an oversight issue. You know, some of your fellow committees have had scorecards. And, you know, I think of the MEGABYTE Act in the sort of the similar vein of updating at the back-end technology system. And it dragged for years before it was implemented until, in this case, House Oversight established a simple report card as to whether or not an agency had done it or not. And within a year, all agencies were in compliance.

So I believe some sort of oversight vehicle would be appropriate.

Mr. Timmons. Chair, thank you. I really appreciate it.

Ms. Olson. If I might add something, I think that every agency has an inspector general. And one thing you could ask the inspector generals to do is to, you know, report on the conformity of the agency with the, you know, mandates of the act. I think that that would give you data and even uncover, you know, some of the reasons why the agency, or the excuses as you say, may or may not be complying, or what the barriers are. And that would be good information to receive.

The Chairman. Mr. Phillips.

Mr. Phillips. Thank you, Mr. Chair.

I think you will all agree that Congress is an institution that has somewhat of a singular mission to legislate and serve, but yet it is an institution in competition with itself.

So as you reflect on the notion of sharing best practices, which is integral, I think, to this conversation, how should we look at creating incentives to share information? Because, of course, right now, the culture is to protect it. It is a competitive advantage, even within delegations and within caucuses and conferences, I think it is fair to say.

So, certainly you, Ms. Meeker, based on your experience, give us a sense of what you think it would take to inspire and reward sharing best practices.

Ms. Meeker. Sure. It is a fantastic question. And I will just say, from my experience as a caseworker, I was always really surprised and heartened by how much collaboration there was among caseworkers. If anything, I think the collaboration was kind of stalled because there weren't good avenues for caseworkers to connect and share those best practices. There is a Listserv with no permanent archive that makes it very difficult to share resources in a way that is long-term and lasting.

But as far as encouraging collaboration, you know, I think every office wants to be known as the innovator, the office that has the best ideas, the best new ideas, the best tools, the best experiments to serve their constituents. I think recognizing some of the work that offices -- individual offices put in to innovate, to try new things, to impress their constituents with how much work and time and effort they put into constituent services would go a long way.

It wouldn't need to be a huge accolade. But I think the CAO, you know, recognizing, hey, here are this month's top five innovative practices for casework would be something that I think would go a surprising way toward moving the needle on encouraging collaboration.

Mr. Phillips. I love that notion.

Mr. Lira, any thoughts on that?

Mr. Lira. Yes, thank you, sir.

So I think of Senator Hickenlooper, now-Senator Hickenlooper, when he was governor, he said something along the lines of there is no intellectual property for good ideas in public policy. I think that was it.

So if governor A comes up with something, then governor B should shamelessly steal that idea. And so building that culture of, you know, shamelessly stealing or being inspired by fellow offices I think would be helpful.

To Anne's point, I think that the spirit is there. When you talk to a lot of caseworkers, but even beyond that at the staff level, there just isn't as much -- the pathways for that collaboration are not institutional, and so they are often ad hoc. You know, a well-motivated Member or a well-motivated staffer will pull a group together in an ad hoc way and it will do some good, and then eventually they will move on to another role or the Member will move on to other priorities, and then it sort of falls apart. So institutionalizing that collaboration, I think, would be helpful.

And to your point on competition, I actually feel that healthy competition, I have found, to be one of the most effective ways to drive change inside the House of Representatives.

Mr. Phillips. Sure.

Mr. Lira. Members can be known to be somewhat competitive with one another in a healthy way, staff as well.

And so, you know, I think like the whip organizations and the respective conference and caucus and others have hosted these sorts of competitions in the conference and the caucus themselves. And it would be interesting if the institution

were to take on some of that, not in a way that would make any one office look bad, but in a way that can celebrate those that are doing good, I think to build on Anne's point, would be really helpful and, again, make competition work for change rather than inhibit it.

Mr. Phillips. So as simple as just creating space and place to share and inspire.

And, you know, it makes me think, Mr. Chair, about the notion of like Shark Tank, you know --

The Chairman. Yeah.

Mr. Phillips. -- whether it is offices sharing what they are doing for some kind of reward and correspondingly to invite outside, you know, entrepreneurs to share ideas with us and have a competition and adopt best practices.

Ms. Olson, the conversation prompts me to wonder what the responsibility of agencies are in this question. You know, we are liaisons. You know, we can't solve the problem typically. We are simply the brokers between frustrated constituents who can't get answers from the IRS or the SSA or the VA.

So, you know, in your testimony, you recommended that constituents would benefit from having similar advocates at the SSA and VA. Why do you think this hasn't occurred yet, considering how fundamental it is?

Ms. Olson. You know, I have talked to some folks that were -- are advocates for Social Security disability folks --

Mr. Phillips. Uh-huh.

Ms. Olson. -- and veterans. And I think that some of it is maybe that, when conversations about such -- creating such an entity would come up, the agencies, these agencies view themselves as providing service --

Mr. Phillips. Yeah.

Ms. Olson. -- to their beneficiaries. And they may feel like that is a judgment on them that they are not doing enough.

Mr. Phillips. Sure.

Ms. Olson. On the other hand, there are external groups that, whose jobs it is, you know, to support those beneficiaries, all of the veterans groups. And they may view it as saying also you are not doing your job well.

And I think it just hasn't been explained that the -- an advocate, an internal advocate complements those responsibilities, those groups. It doesn't replace them, substitute for them.

I think a very interesting statistic in the Taxpayer Advocate Service caseload is that about 35 percent of the cases, actually the taxpayers are represented by an attorney or a CPA. It is because that professional has gotten stuck --

Mr. Phillips. Yeah.

Ms. Olson. -- you know, or some real harm is going to happen, and speed is required and somebody to cut through the internal bureaucracy. And I think if it is explained in that way --

Mr. Phillips. Un-huh.

Ms. Olson. -- it may be viewed differently. But those conversations really haven't happened yet.

Mr. Phillips. Okay. Do any of you disagree with my contention that Congress should enhance its role and responsibility to provide oversight to the various agencies and ensure that they provide better customer service, if you will? Does anybody disagree?

Ms. Olson. No.

Mr. Phillips. With that, Mr. Chair, I rest my case.



The Chairman. All right. Mr. Latta.

Mr. Latta. Well, thank you very much, Mr. Chairman. And thanks to our witnesses today.

In some of your testimony, not directed to you, but what you have in there hit raw nerves with me, because of the work that we do.

Just kind of background, I am one of these that I have got to see everything that is going on in my office. I sign every constituent letter that goes out. I get a monthly report as to every department that we have worked with, every county that we are having an issue in. And then with the leg letters, I read every letter before they go out, because I think it is important for me to know, but because there is a lot of work and not enough time and not enough staff.

But if I could just start and -- because, again, things that really hit nerves. Ms. Meeker, not -- nothing on you but what you stated, when you were working on WEP, I have been working on that since I have gotten here. This is my eighth term. I have had the IRS in my office saying that they need to put in a statement in large print when they send out their notices every year or month or whenever they send it out to an individual taxpayer, that if they are in a dual system, like the State of Ohio that has five different systems for the State employees, that at the end, you are going to get your Social Security reduced.

And so, you know, how -- you know, because, again, you know, in your testimony, you talk about, you know, that what your work and how, you know, you had to reach out to them. But I guess my thing is, is how do we get to these people beforehand to let them know that, before they go from one system to another, they better make a hard decision on that, because in the end, it is going to affect them in their retirement?

So I am just curious. And not picking on you right off the bat, but I tell you, some

of your testimony today hit raw nerves of what we are working on all the time, but this is something since 2007 I have been involved with. I have been involved and -- even though I am on Energy and Commerce, working with the folks on Ways and Means. But I am just curious, how -- you know, how can we get that information out to taxpayers early on in their careers that we don't hear it?

I just had a courthouse conference through my counties during the 4th of July work period, and it came up again. People have -- this is something that is happening all the time.

But I would love to hear from you.

Ms. Meeker. Yeah, absolutely. And I certainly hear you on that raw nerve. Those cases were some of -- as I mentioned, some of the ones that stayed with me because -- the feeling for the constituent of surprise, of that, I could have made this decision and no one told me I had to, is brutal. It is, I think, one of the most alienating experiences from your own government that you can have is that feeling of just awful surprise and of information not being provided timely.

So I mentioned some of the things that we did in our district to try to get the word out early, including building that calculator that helped people accurately predict their benefits. But I think, stepping back for a second and thinking about it in a big picture, I think one of the things that may come out of professionalizing the contacts between caseworkers and agencies, I would hope, would be a more proactive partnership between agencies and caseworkers.

As Nina mentioned, one of the unusual things about TAS is having a local, accessible field office. And Congress has local, accessible field offices.

So what I would love to see would be a more professional working relationship that solves cases faster between caseworkers and agencies, but then also more of a

two-way street, also more of agencies partnering with congressional offices to give proactive information, to say, hey, our policy is changing. Here is how you can help get the word out, or here is how we can tap into your local knowledge and your local expertise, your networks of county councils and, you know, local retirement advocates to help people make that decision. I would love to see Congress kind of take more of a service-minded approach to communication and preact -- proactive constituent services in that way.

Mr. Latta. Okay. Well, thank you.

Ms. Olson, again, on your testimony, especially what you do, here is something, especially with all, not just picking on the IRS, but with all agencies and departments, this is one of the things that when we get involved in these cases that I have said, why does it take a Member of Congress to have to contact an agency or department to do a job for a constituent that they need to be doing?

And, again, you know, we reach out to the taxpayer advocates all the time because, again, when I look at our caseload right now, it had been veterans. But after what has happened in the last 2 years, our -- the massive part of our caseload runs right back into IRS.

And so, you know, how do we -- because I found it interesting. In your testimony, you said: Moreover, as the IRS relies more and more on the historical data to train its models, filters, and artificial intelligence algorithms, TAS case data should be used to train AI models to overcome historical bias.

Could you explain that?

Ms. Olson. So in our cases we had, in general, when I was there, about a 70 percent relief rate. Sometimes in some issues it was 80 -- one year for identity theft it was 90 percent, meaning that the taxpayer had tried to solve their problem with the IRS

before coming to us and it wasn't resolved. And in 90 percent of those cases, when they came to us, we got the relief the taxpayer was asking for.

And so, you know, in an audit, for example, if we have a 60 percent relief rate, and the IRS is using its case data to program a computer to select cases for future audits, if you don't plug in our case data that showed you selected the wrong person for audit, in 60 percent of the cases that came to us, we got a different result, you should plug that information into the machine to see whether there are any trends, any pieces of information about our cases that would inform the machine it could learn from and not select that wrong person the next time.

And, you know, I have been after the IRS about that for years to do that, because we are sitting there with 4 million cases, you know, that they could really learn from our results and our, you know, and our experience.

Mr. Latta. Not to interrupt. Why isn't the IRS listening to you? Because, you know, you are the ones out there that are actually talking to people.

Ms. Olson. I know.

Mr. Latta. And so I am just curious, why aren't they listening?

Ms. Olson. Well, I would say in the last, since I have been outside the IRS and fussing at people there, they -- they have -- I have had better conversations about this, partly because people are more focusing on artificial intelligence and they are asking those questions.

I can't -- I think there is just a culture in the IRS that it just has so much work that it just -- it is easier to just continue doing the work the way you have been doing than take a step back and look at how you could maybe improve it.

That is partly what the job of the Taxpayer Advocate Service was inside the IRS was to constantly be there at the table, saying take that step back. And we would have

successes, but it is a big organization and it takes a lot to do that.

Mr. Latta. It sounds to me like it is an act of Congress.

Ms. Olson. Yeah.

Mr. Latta. If I could ask -- you have been very kind in indulging me here, Mr. Chairman.

You know, one other, Mr. Lira, that also, you know, you brought up about the inefficiencies, again, about our -- for our staffs and our offices. Again, we get a lot of work. We don't have enough people to get this done.

But I am just kind of curious, again, just here again, how -- what is the best way that, you know, staff can get as much work done? Because, again, you know, we are talking all the time as to making sure we are not reinventing the wheel. And I have always said this. You know, imitation is the greatest form of flattery. And so if somebody is doing something great, let's do it. You know, let's find out from other offices.

But, you know, again, how do we get -- again, making sure that -- I know you were talking about whip and everything else, but we want to make sure that, you know, everyone is operating efficiently, because our biggest enemy is time and we don't have the staff to be able to get it done. So, you know, it is important that we don't have burnout.

Mr. Lira. Thank you, Congressman. That is a great, a fantastic question.

I think -- when I think about the average individual Member office, you kind of break down the working hours of that office. And it is almost as like a pyramid, if you will forgive the analogy. There is -- some of the best opportunities are at these entry-level and junior positions, because even though they are not as high up on the org chart, they possess so many of the working hours that could feed into more capabilities

for the overall office.

And so most of the inefficiencies in the average Member office, in my experience, are things to be endured. So, you know, if you are an intern or you are an LC, and you pay your dues, and then you come out of it, and now I don't have to worry about that anymore and now I can focus on, you know, other things. And maybe I oversee these processes, but the inefficiency is no longer my problem.

And this is not true of all Member offices by any stretch of the imagination. But prioritizing solving for the inefficiency of these entry-level and junior offices, again, I am talking as an institution here, I think possesses enormous opportunity.

So to be specific, I think when you break down the workload by tasks, what are those tasks which are manual and repetitive? Because that is through -- I mean, whether it is robotic process automation or machine learning, the software exists to automate those tasks today without losing any semblance of the accuracy and enabling the shift from low-value to high-value work.

And so in so doing, let's say, you know, conceptually that you free up one working hour a week for 10 people. Well, that is 10 working hours a week. And that is a very conservative estimate about what RPA or the technologies could do.

And so identifying topics of letters or sorting is this casework, is this an issue request, is this a tour request, these sorts of manual, repetitive tasks could, again, unlock a lot of working hours, which not only enhances the capability of the office, but to the tail end of your question, I think could deal with recruitment and retention issues as well as people -- everyone wants to do that higher value work.

It is a convenient truth. So I will say it. But, you know, your office is known to be one of the more innovative offices. It has been since my time on the Hill. So I don't now how much of that applies to Team Latta, but it is certainly an opportunity for

Congress as an institution, I think, writ large.

Mr. Latta. Well, one of the things -- and, you know, I am very proud of our staff, but also the interns we have in the office. I will just finish with this. When the interns come in, they come back the next day. Say, oh, good, they came back. I don't think we ever had one quit. But they -- you know, they do a great job.

But thanks so much for your testimony. I really appreciate it.

Mr. Chairman, thanks so much for your indulgence.

The Chairman. You bet.

All right. Mr. Cleaver.

Mr. Cleaver. Thank you, Mr. Chairman.

Thank you for being here. This is one of the most significant issues, I think, that we deal with, or maybe that we do not deal with, and that is, you know, customer/constituent relations.

And so, you know, it goes back to some of the most basic things because, you know, people don't expect government to work. I mean, I think we have created that, albeit unintentionally. But our people, you know, just believe that, you know, no matter what happens, that they are not going to get an answer, that they are going to get put on hold, no matter what happens to them.

And Maya Angelou said that people will never forget -- people will forget what you say, people will forget even what you do, but they will never forget how you made them feel. And so I think that, you know, there is good way to even say, you know, we can't help you.

And so, because of that, I am sitting here thinking, Mr. Chairman, that we don't -- I am not sure that there is any training for people who work on this Hill to respond to constituents. I mean, they are good people. They want to do -- but they don't -- they

don't -- I mean, there is nothing -- it is not their fault. They come in. You know, we give them orientation in our office, and there is your desk.

So I am not going to criticize the Members, because I think the pace here is hectic. But that is even more reason that we are to deal with that. Or do you agree that maybe we could better respond if we knew how to respond to make people feel that we were responding? Is that -- am I --

Ms. Olson. You know, if I may, I mean, overseeing the case advocates, you know, their day is they get yelled at by taxpayers who are frustrated. Then they turn to IRS employees to do something, and they get yelled at by IRS employees who don't want to -- you know, that are just busy and don't want to hear from them.

And we really early on realized the emotional toll that that took, and asking our case advocates to be empathetic, you know, with the taxpayers that they were talking to was a heavy lift if we didn't give them the tools.

And we really have tried, we really had tried to develop training. Now, I happen to think that that is an endless process. You cannot ever stop doing training --

Mr. Cleaver. Yeah.

Ms. Olson. -- and recognizing the burden and the need to have downtime and time to just regroup and not constantly be on the phone and carve that in.

And we also really tried to do training for our employees to really think about the taxpayer side, how they were feeling. And so we would do role plays literally where one of the employees would be the taxpayer and would have to navigate, you know, a bureaucracy, just to remind themselves of what it felt like, so that when somebody was yelling at you, you could learn to diffuse the situation. And there are tools for diffusing.

I am also reminded, when I ran my low-income taxpayer clinic before I became the taxpayer advocate, I had a student intern, and I was listening to him do intake. And I



was in my office, listening to him for 5 minutes, trying -- he had this taxpayer who just was -- wanted to rant. And I could hear this person just try to control him and get him off onto, well, what is the real issue. And, of course, it took 5 minutes.

And I said to him, after the call, I said, you need to give taxpayers 5 minutes to rant and then get them down to business, because they are going keep coming back to that rant if you don't let them rant. They have to say it because it is about their feelings, and then you can get them down to business. They are tools.

Ms. Meeker. If I can jump in as well. I definitely agree. There isn't -- there isn't a standard manual that someone hands you when you become a caseworker. There is no one standard, Congratulations, you are a caseworker now. Please attend this training at 9 a.m. on Tuesday.

Caseworkers do an amazing job with ad hoc resources, and a lot of them are catch-as-catch-can. Some external organizations offer caseworker resources and training. I know the Congressional Staff Academy has some wonderful classes now that were not available when I started. I am a little bit jealous.

But just to kind of put a finer point on the problem there, casework is high stakes. I mean, everything that Congress does is high stakes, of course. But if -- for an untrained caseworker, if you make a mistake, not knowing what the rules are, if you make a mistake that harms a constituent, that reflects on the Member. So I would absolutely just double-click on that point that the training is really vital and necessary and it is not standard.

Mr. Lira. Yeah. If I may add, I think the process either respects someone or it doesn't. And by the time someone has called their Member of Congress about a casework concern in particular, that is very rarely the first call they have ever made. So they are typically calling or writing an email from a point of desperation, from a point of

feeling disrespected.

And so that only increases the need for Congress to be that much better in handling those requests, because they are starting in deficit with the person's feelings towards their government as a whole. However, those are the moments when meeting those standards can actually reshape someone's perspective the most dramatically.

To borrow a crude analogy, when you are feeling disrespected at the airport but then the gate agent actually makes it better, you actually start to love the airline.

And so that is my view. That safety valve is where Congress can uniquely play a role. Say, look, you wouldn't have come to your congressional office unless you felt disrespected or ignored or something is not working. But now that you are here, let's be that person that makes you understand why government, and particularly representative government, plays such a valuable role for you as a constituent.

Mr. Cleaver. I wonder how difficult it would be for us, I mean, for us to think a bit more deeply about what happens when we hire people and how little preparation they have. My paranoia says that Members say we don't have time for that. We, you know, we got to -- we are on three committees and they are meeting at the same time, and we, you know, we got people calling on the phone. We got people to -- we need people to respond.

And I know there is no simple answer, but I think this -- this may be one of the most significant issues that our committee could deal with because of what I have heard all three of you saying about, you know, people, you know, are angry.

And I think a lot of people make calls to us, anticipating a negative response. You know, they are going to send me to, you know, water department, you know. And I wish there was a way we could get it -- get this, you know, incorporated into this system, you know, when you get hired.

I mean, one of you said, you know, I mean, it is not a program, it is a culture. So we would have to -- there should be something going on all the time, and I don't know how -- I mean, you guys are smart. So you are probably going to figure it out before we have the adjournment.

RPTR SINKFIELD

EDTR ZAMORA

[11:01 a.m.]

Mr. Cleaver. But, I mean, I think it is critically important. I can't tell you how many people have talked to me -- probably all of us -- you know, I called IRS. You know, they put me on hold, and I got a voice, and the voice was not human. So I think this is an important subject, and I also think we ought to figure out how to respond to it just because, during these times, it may be more important than an error. So thank you for being here.

Thank you, Mr. Chairman.

Mr. Lira. If I may?

The Chairman. Go ahead.

Mr. Lira. Thank you, Mr. Chairman.

You are exactly right. And I think when most staff come in, if there is any training at all, it is either for people who opt into it because they are kind of go-getters, and so therefore it is not everybody, or they just mimic the culture of the office that they got hired into.

Mr. Cleaver. Yes.

Mr. Lira. And which works great when things are going great. But the problem is, especially with technological change -- and I think it is a unique opportunity for this committee in particular to say, well, if we are going to drive cultural change in offices and teach them the new way forward, then starting with people, literally, on their first day, and how does orientation work to help them reimagine how their offices then operate.

And as the other witnesses have indicated, continuing with that throughout their career as staff and then, ultimately, you know, for Members as well. But even chiefs of

staff, you know, will say that when you would talk to them about changing a system, or let's change the way the correspondence is done, I mean, this is a mammoth task. And so they often will say, well, I don't know if it is the right fit for our office because, you know, we have got enough, you know, things to do. And so really prioritizing that training to show people how it can be done I think would add a lot of value.

Mr. Cleaver. I am through, but we ought to -- we probably need some -- I mean, you know, some kind of operation that, you know, is operating all year long. And when a new hire comes in, you know, one of the very first things they do is they go spend whatever time in this classroom. But the conundrum is always the voters, you know, well, you guys are spending too much money on, you know, on your offices, you know, not realizing that we are trying to respond better to them. And that also points out the problem we have that, over time, people build up these ideas about, you know, how inefficient we are and how mean we are.

Ms. Olson. You know, if I may, it is not just Congress' responsibility here. The agency -- you know, as I put in my testimony, my local taxpayer advocates, when they knew there was a new constituent services person in a local office, we made it a point they were required to go over to that office and meet with the new constituent services person to talk about how we do -- what they need to do in order to get cases to us; the authorization that we need to get and how it needs to look. We didn't just expect the congressional offices who are busy and had tons of stuff to do to train their people on our processes. And I think that is something that the executive branch can do if they are more alert.

I mean, they have got a role in constituent services. They are taxpayers. So we took that very seriously. And that can be reproduced and make it much easier. It wasn't a long conversation, but it was enormously helpful.

Mr. Cleaver. Thank you.

Ms. Meeker. And may I jump in on that? As someone who is on the receiving end of their local taxpayer advocate service training, that was so unusual, and so, so, so valuable. And I definitely agree it is part of the agency's responsibility. There are two halves to casework training. There is how do you interact with constituents? As you said, Mr. Cleaver, there is, you know, the kind of trauma-informed care in the, how do I make you feel hurt? How do I make you feel seen and appreciated? And then there is how do I actually solve your problem, and that is on the agency side.

So I think a solid base on how do you interact with constituents and create that experience, maybe Congress' responsibility, but I definitely agree the agencies have a role to play as well. And some agencies do this, and they are knock-on effects -- knock-on benefits for caseworkers on that first bucket as well.

So I know the Army runs a regular conference, I believe it is every 2 years. USCIS runs a regular conference every few years. And those are enormously valuable, A, for training their caseworkers, but, B, for bringing their caseworkers together in person to learn from each other. That is where I built some of the kind of peer mentorship relationships where, you know, I was director of constituent services and a new director of constituent services who didn't know what to do. But I knew there was someone I had met from a regional office that I met at the Army conference, so I could give her a call and say, hey, I have got this weird case, have you seen this before? So kind of the opportunity for caseworkers to learn from each other is also hugely valuable.

Mr. Cleaver. Thank you.

The Chairman. I have got like five questions, but let me try to boil them down a little bit.

You know, one of the things that had struck me -- and maybe you can speak to

whether this exists in Congress -- if I had my predisposition -- you know, I mentioned, you know, when I go through the airport, CLEAR sends me a text, and I am able to give them feedback on how it went. I would Yelpify the heck out of this place.

Now, the challenge is, in a political context, like, there is practitioners of the dark arts who might use that tool for ill, but is there a way to do it? I mean, I am just trying to think through, are there recommendations our committee could make that would make more standard feedback that can improve the performance of the institution when it comes to casework and constituent interaction?

Mr. Lira. Mr. Chairman, so, absolutely. I think that the political realities being what they are, I don't necessarily know if you want to go full Yelpify --

The Chairman. Right.

Mr. Lira. -- per the gamification risk. But you have the ability to collect consumer experience metric -- you know, feedback metrics at the end of every transaction.

The Chairman. Yeah.

Mr. Lira. Some government agencies do this in a way that is almost, you know, comical, but I guess it is -- their heart's in the right place, where they --

The Chairman. Does anyone do it well? Is there anyone we should look at.

Mr. Lira. Well, I tend to be at the perspective that you look to the private sector, as CLEAR being an example. But as you indicate, at the end of every single transaction -- you know, even something -- I often think of, you know, on receipts, at the bottom of a receipt there will be surveys that will say, you know, we will give you a gift certificate if you fill out a survey on your experience. So what that says is that the company is willing to pay people for their opinion about how well they are doing.

In Congress, you don't typically have to pay people because they want to share

their opinion with this institution. And so it is really about collecting that information in a structured way. And I think this is -- thematically, the most important thing I can say on this topic is so much of that is ad hoc and actually creating those capabilities at an institutional level. So it is not incumbent on an individual Member office who will conceptualize and then implement a system like that. It should just be a standard CX package where at the end of every single -- you can be as extreme as, at the end of every single phone call there is a quick, you know, audio survey; at the end of every email there is a link. And, again, I would look to the private sector for best practices.

The Chairman. Yeah.

Ms. Olson. You know, in my -- Congress required the IRS back in 1998 to come up with balanced performance measures. You know, not just look at quantitative, how many audits you did, et cetera, but also measure it with -- balanced with employee satisfaction and customer satisfaction. So the IRS has a robust customer satisfaction survey process.

In my organization, you know, we would take representative samples, and it would be down to the office. So we knew of those 75 offices, we could project results back to either the area or to the actual office of customer sat, and we would do it on a quarterly basis. And what I always found really interesting was one of -- we would ask a whole bunch of questions, but one of the questions that we asked, particularly -- and we didn't just do customer sat of the people who got results that they wanted, we also sent surveys to the taxpayers who we weren't able to assist for one reason or another.

The Chairman. Sure.

Ms. Olson. We didn't get the result they wanted. And in about 35 percent of the cases where taxpayers didn't get -- we couldn't get them the result they wanted, they still said that after their interaction with the Taxpayer Advocate Service, they felt better



about the IRS as -- on a whole.

And I think that goes, you know, Congressman Cleaver, to your point about feelings, that they had somebody with the case advocate who actually listened to them, and they felt like the case advocate did what they could, and they were heard. And I think that kind of survey, you know, of your constituents can show all sorts of really interesting stuff.

And there are good examples in private sector about the questions that you ask, but also in some of the agencies, the questions to ask to get at more root issues about what is really going on with your relationship with your customers, your constituents, or whatever you want to call it.

The Chairman. Yeah. I actually think your suggestion of having that become sort of standard practice makes a lot of sense. I don't know that individual offices can develop that on their own. So I think one of the things this committee could think about is, does the institution create a module for your office where you can, you know, use it or not? But I think there are some offices that would want to learn how they are performing and how to improve their performance.

Along the lines of learning things from private industry -- this may seem like a dog and cat kind of question -- but when I order pizza, I can track when it gets put in the oven and when it is leaving the pizza joint and where it is on its way to my home. One of the most common interactions in a congressional office is people order flags, and there is no, currently, portal to track flags. This seems like something we can fix.

You know, is that something that you think we ought to be thinking about? Is that something that would require -- do you think it is a smarter thing to do, institutionwide, House and Senate? Any thoughts on that?

Ms. Meeker. Yeah, absolutely. And I think the flag pizza tracker would be just

a small thing, but such a huge way to show trust and demonstrate transparency.

This kind of comes back to, where does innovation come from in Congress? I believe -- and I apologize, I don't have specifics today -- but I believe it may be Code for D.C. is working on a pilot project to figure out a workable sample for how to do a flag tracker. And that is fantastic. We really appreciate -- you know, I worked with Code for Boston. And when I was working with Congressman Moulton's office, it is amazing to kind of have the energy and the insight and the volunteer hours to educate Congress on how technology should work from these local civic tech groups. But it is interesting that the input is for that, and the work comes from an outside group rather than the impetus taken within Congress. I think that this kind of telling about where innovation is coming from in Congress today. But Matt may have more thoughts.

Mr. Lira. Yeah, absolutely. I love this question, Chairman. One of my friends actually created the first pizza tracker. So I will be sure to send him this clip, and he will be very excited.

You know, the powerful thing about the pizza tracker, which incidentally led to when -- Domino's was the first to do it, and they led to four quarters of over a hundred percent sales growth, like quarter of a quarter, which is a remarkable sales growth. And there is a lot of components there. But one of the key issues is that transparency of the process takes the uncertainty out of it.

I was once stuck in a snowstorm in the middle of the night in North Carolina on the way back to D.C., and the traffic came to a complete standstill at like 1:00 in the morning. And it was obviously really frustrating. And then I heard over the radio that there was a power line down and the road was going to reopen at like 1:45 a.m. And even though I knew it was going to take 45 minutes for the highway to reopen, my comfort level immediately went up. Because the transparency over the process, you

know, brings comfort to any process. And the pizza tracker is emblematic of that.

So I absolutely believe that, even if it is going to take time -- to your point earlier, Mr. Cleaver -- even if the answer sometimes is no, the transparency over that process is going to build a lot of satisfaction. And so I think that the Congress, the House in particular, has for some of the constituent services that are more transactionable in nature, whether it is a tour request or a flag request, has the ability to build these sorts of platforms.

And then, again, not to go back to my same, you know, hobby horse, I would say that you could even build APIs to enable other people to build applications that show the same information in different formats. But it is an area of tremendous opportunity. And, incidentally, it would likely reduce the number of incoming call volumes following up on what is the status of my tour request or my flag request, whatever it may be, which therefore means the remaining calls could be more efficiently handled at, again, higher value.

The Chairman. Let me ask one more, and then Vice Chair Timmons may have additional questions too. I know President Biden recently signed an executive order directing Federal agencies to improve the customer experience, and dealt specifically with what is referred to as the time tax, the undue burden that Americans face. And we have seen that with folks having to navigate confusing websites and fill out duplicate forms and often answering invasive and confusing questions, and just the time for someone who may often be in crisis, if they are dealing with food insecurity, or trying to get care for a loved one, and having to be their own advocate, and having it take a lot of time.

So as we look to improve constituent services in Congress, any thoughts on how we can ensure that our internal operations are not imposing a time tax on our

constituents?

Ms. Meeker. Sure. I would love to jump in on that one. Yeah, absolutely. And I would just like to flag also, caseworkers have incredible expertise into that time tax. I mean, that is such a huge part of what we handle in casework is constituents who -- that that time tax is not payable for one reason or another. They don't have the time. It is a crisis situation. So thank you for bringing that up.

As far as what we can do to eliminate the time tax for constituents who work with congressional offices, the Privacy Act release form is a huge point. I know we talked earlier about the CASES Act and making sure that we are not chasing constituents over and over for different copies of the Privacy Act release form that have different information, because the agency won't take one that has a Social Security number on it, but it will take one with your alien number. There is a lot there that could be really streamlined if it was entirely digital. So that is a huge point.

The other point that I would like to raise, thinking back about our own casework operations, the biggest movement when we put a time tax on a constituent that I was uncomfortable with -- or I wish we could have avoided is when we had turnover in casework staff. So when, for one reason or another, whether it is staff turnover or we had to shuffle portfolios for one reason or another, we had to transfer a case between different caseworkers. And that was the point where, no matter how good our handoff was, no matter how warm that handoff was, no matter how extensively the outgoing caseworker briefed the incoming caseworker, the constituent would have to explain things over again. They would have to start from zero on building up trust with the new caseworker.

So anything that Congress can do to improve staff retention for caseworkers would really eliminate that particular segment of time tax.

The Chairman. Excellent.

Mr. Timmons.

Mr. Timmons. Mr. Chairman, this has been great. I think we got a lot of meat that we are going to be able to make some recommendations on. I do not have any follow-up questions. Thank you.

The Chairman. Do you have questions?

Mr. Davis. No.

The Chairman. You sure? Okay.

Did you have any other questions?

Mr. Cleaver. No.

The Chairman. Okay. I think this was terrific. I really appreciate the specificity of the recommendations. You gave us a lot to run with, I think. And my hope is that our committee will be able to make some recommendations in this space.

So I want to thank our witnesses for their testimony, and also thank our committee members for their participation. As always, I want to thank our staff for pulling together such amazing witnesses. And it was such a value-adding hearing. And to our stenographer for putting up with how fast we talk. And to the Armed Services Committee for letting us use their room, thank you.

Without objection, all members will have 5 legislative days within which to submit additional written questions for the witnesses to the chair which will be forwarded to the witnesses for their response.

Mr. Davis. I object. I don't know if that has ever happened before.

Watch that trigger, Emanuel.

The Chairman. I ask all witnesses to please respond as promptly as you are able.

Here we go again. Without objection, all members will have 5 legislative days

within which to submit extraneous materials to the chair for inclusion in the record.

And, with that, this hearing is adjourned. Thanks, everybody.

[Whereupon, at 11:19 a.m., the committee was adjourned.]